

## **Will Fact Sheet - Strictly optional**

We absolutely do not require you to fill in the sheet before meeting with us. Rather, some clients asked us to provide them with a questionnaire to fill in so that they can gather their thoughts prior to meeting with us. Leave any information blank you don't want to fill in.

Call to schedule your appointment with Badeaux and Associates, **(281) 486-4737**, 16055 Space Center Blvd. suite 260 Houston, TX 77062, [jb@dedicatedlaw.com](mailto:jb@dedicatedlaw.com)

### **CLIENT NAMES**

1. Your Name: \_\_\_\_\_

Home Address including county: \_\_\_\_\_

Telephone numbers (list all please): \_\_\_\_\_

2. Spouse's Name: \_\_\_\_\_

3. Were either of you born outside of the United States? \_\_\_\_\_

4. Year of Marriage: \_\_\_\_\_

5. Is this your first marriage? \_\_\_\_\_

If not, do you have children by the prior marriage? \_\_\_\_\_

### **CHILDREN**

1. Name: \_\_\_\_\_

Age: \_\_\_\_\_

Present City and State: \_\_\_\_\_

Do they have children? If so, list: \_\_\_\_\_

2. Name: \_\_\_\_\_

Age: \_\_\_\_\_

Present City and State: \_\_\_\_\_

Do they have children? If so, list: \_\_\_\_\_

3. Name: \_\_\_\_\_

Age: \_\_\_\_\_

Present City and State: \_\_\_\_\_

Do they have children? If so, list: \_\_\_\_\_

4. If you have additional children, you can add their information at the end of this form.

**ASSETS** - \*Do not list detailed information because website not secure.\*

1. Do you own any real estate outside of Texas? \_\_\_\_\_

2. During your conference with us, we will ask you about your assets in general terms.

3. To whom do you wish to leave your assets:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### **LAST WILL & TESTAMENT**

We do not expect you to be certain of the persons you are filling in for Executor, Trustee, or Guardian, and you do not have to fill in all names. Rather, during our meeting with you, we will thoroughly discuss each of those roles, and the person you tentatively chose.

**1. EXECUTOR** - Administers the Will and distributes the assets to beneficiaries

a. First Executor: \_\_\_\_\_

b. Alternate Executor: \_\_\_\_\_

**2. TRUSTEE** - Handles the money for any trusts created in your Will

a. First Trustee: \_\_\_\_\_

b. Alternate Trustee: \_\_\_\_\_

**3. GUARDIAN** - Raises your minor children

a. First Guardian: \_\_\_\_\_

Address: \_\_\_\_\_

b. Alternate Guardian: \_\_\_\_\_

Address: \_\_\_\_\_

### **DURABLE POWER OF ATTORNEY - for finances**

a. Name of Agent who acts on your behalf: \_\_\_\_\_

Agent's City and State: \_\_\_\_\_

b. Alternate Agent: \_\_\_\_\_

Alternate Agent's City and State: \_\_\_\_\_

**MEDICAL POWER OF ATTORNEY**

a. Name of Agent: \_\_\_\_\_

Agent's City and State: \_\_\_\_\_

Phone Number: \_\_\_\_\_

b. Alternate Agent: \_\_\_\_\_

Alternate Agent's City and State: \_\_\_\_\_

Phone Number: \_\_\_\_\_

**DIRECTIVE TO PHYSICIAN - (Living Will)**

We will advise you about the Directive to Physician during our meeting.

**COMMENTS, CONCERNS**

If you have any special concerns, you can list them here; otherwise you can wait until our meeting.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**FEES**

Fees for a Last Will and Testament are generally between \$450.00 and \$1,250.00, per Will. The fees depend on whether the Wills are for a couple, first or second marriage, single person, or involve estate tax planning. A fact situation where Wills are generally \$450.00, per Will is:

**A couple, first marriage, identical Will provisions. The Will and fee includes trusts for minor children, guardian, and executor. Fee \$450.00 per Will, total \$900.00 for the couple.**

**Coordination of Last Will and Testament with Beneficiary Designation Assets:** The cost of the Will includes overall advice on coordinating a Will with beneficiary designations, such as life insurance. Beneficiary designation and rights of survivorship style accounts are independent from your Will's beneficiaries.

**Timeframe for Wills and Powers of Attorney:** Badeaux and Associates has a streamlined, but thorough process for its Will and estate planning clients. The process generally takes 2-3 weeks from beginning to end. The process is:

- i) An attorney meets with you, listens to your goals and objectives, asks relevant questions, gives advice, options and alternatives, and obtains all of the information to prepare your Last Will and Testament and Powers of Attorney.
  
- ii) Approximately 2 weeks later, Badeaux and Associates mails the drafts of the Wills and Powers of Attorney to you for your review,
  
- iii) You contact our law firm when you are ready to sign the Wills and Powers of Attorney in our office. We provide the notary and 2 witnesses.
  
- iv) The original Wills and Powers of Attorney are given to you for safe keeping, and Badeaux and Associates keeps a copy.

## **TIME TO COMPLETE DOCUMENTS**

We have a streamlined time frame for estate planning clients which is generally 2-3 weeks, if not shorter. In general the process is: 1.) meeting with clients and collecting all facts necessary to draft the Wills and Powers of Attorney, 2.) approximately 2-3 weeks after first meeting, mailing drafts of all documents to clients to review, and 3.) clients calling to set appointment to sign documents in our office. We provide witnesses and notary.

## **APPOINTMENT**

We look forward to assisting you with your Wills and Powers of Attorney. Call to schedule your appointment with Badeaux and Associates, **(281) 486-4737**, 16055 Space Center Blvd. suite 260 Houston, TX 77062, [jb@dedicatedlaw.com](mailto:jb@dedicatedlaw.com)